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HOW TO IMPROVE YOUR FILES

Several Practical Solutions
To Office Filing Problems

A Filing Procedures Guide

Prepared by

RECORDS MANAGEMENT STAFF

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YOU CAN IMPROVE YOUR FILES

PROBLEM	SOLUTION
1. Insufficient guides.	1. Make a metal tab guide card for every primary grouping in your files, and for the larger secondary subjects or groups as well. Correspondence Files average a guide card per 6 to 10 folders. Card Files average a guide per 30 cards. Guides cut search time.
2. Broken tabs.	2. Replace guides and folders having bent or broken tabs, or difficult to read titles.
3. Missing, illegible, or small label on drawer or folder.	3. Have drawer labels with large print. Label every drawer and folder. Security can be preserved and still have good, helpful drawer labels.
4. Variety of indexing rules.	4. Be consistent. Keep arrangement uniform throughout for fast filing and recovery of papers. Use File Handbook for file titles and label text. Date file folders. Start a new set annually.
5. Label Problems.	5. Type and fasten labels with care in the first place to save problems later. Re-do poor ones. Plan your label text and color codes. Don't use a variety of label colors and styles. Label each folder in the same spot. No grasshopper jumping across file drawers to locate folder title.
6. Seldom used folders with one or no papers in them.	6. Never keep empty folders in a file. Use a general or miscellaneous folder for several one-time items. Create a new file folder only after accumulating 7 to 10 papers on the same subject.

PROBLEM	SOLUTION
7. Loose papers with no folder.	7. Always use a Kraft File Folder for efficient filing. Loose papers slide under folders, get damaged, and disorganized.
8. Too many papers.	8. Keep your files free of non-record papers that contribute no useful information. Eliminate duplicates, carbons, drafts, buck slips, routing sheets, and so forth. Few such papers have notations worth keeping. Catalogs, pamphlets, advertisements, circulars, and such usually are not records. Extra papers increase your file size and searching time.
9. Bulky folders sagging low in drawer.	9. Divide large groups of material into two or more folders. Break files annually for better control and easier handling. Heavy Duty pressboard folders should NOT be used in your office correspondence file. They only add to your problem.
10. Poor distribution of folders.	10. Keep current material in your file. Move last year's papers into an inactive file. Dispose of old inactive files in accordance with office Records Schedule. Separate office administration papers from case or project files.
11. No flexibility for growth or removal of obsolete material.	11. Don't crowd file drawers. Leave room for operation and expansion. Use your Records Control Schedule to purge your files of inactive records. Annually, retire old records to Records Center and destroy obsolete material.
12. Long searches. Poor index.	12. Always make an index for your file. Keep it in front of drawer. Make it consistent with folder titles. Another good thing is a cross index list, because many filing requests you receive are quite different from the titles used in your files.

PROBLEM	SOLUTION
13. New people can't understand files.	13. Studying the index helps understand a file. The Filing Handbook is for training too. Are the overall files sub-divided into logical groups? Are your administrative office files separate from operations files, or are work folders mixed with office records and reference material?
14. Missing Records.	14. Use Charge Out Cards and Cross Reference Sheets (Forms 119 and 135). When old records are brought forward from inactive files to current files, leave behind a Continuity Reference Form (232). Write file classification on papers before filing.
15. Mis-filed papers.	15. Have an "In Basket" for all papers to be filed or refiled. Don't let everyone remove files or replace them. Have one person responsible for keeping order in the file or in part of a big file.
16. Too much bending, stooping, and squatting.	16. Keep your current, active file in the middle drawers of your file cabinets. Put your inactive files in the bottom drawers. Send the old records to the Records Center. (You can get them back quickly -- there are two courier trips a day between Headquarters and the Records Center.)
17. Old records accumulate dust.	17. Back rooms, basements, stock rooms, attics, closets, and such are no place to keep records. Old files that must be kept should be itemized and sent to the Records Center. Obsolete and duplicate material should be destroyed in accordance with your office Records Control Schedule.
18. Filing takes too much time.	18. Try loose filing for a month or so. You'll find adding and removing papers much easier and quicker. Only chronos, case files, and projects should use folders with fasteners. Check your filing system and procedures. Are they smooth flowing? Do your equipment and supplies fit your file needs?

PROBLEM	SOLUTION
19. Filing is exhausting.	19. Sort and arrange papers at your desk before going to the files. Use such filing aids as: Sorting Racks to arrange papers quickly; Low Stool for working in low drawers; Wheeled Step Ladder for tall shelves; Filing Trays and Clip Boards to hold papers while filing and making notations; and Market Wagon or Library Cart when filing large collections of folders.
20. Need for advice.	20. Every area has an assigned "Records Officer". The Records Management Staff (Ext. 2468) will help you to contact him. These Records Officers and this Staff can advise you or your office about filing systems, equipment, or records disposal. The Records Management Program covers all paperwork from creation and use to destruction or preservation.
21. Mussed hair, shiney nose, and frown.	21. Take a break. Spruce up. THEN check this list again and your smile will return. Hundreds of files create the same problems yours do, so don't dispair. With this list and a little common sense, you can easily solve your file problems. A few minutes on improvements each Friday afternoon will ease and speed next week's filing.